

## How to Renew an Activity

This step-by-step shows how to renew a Work Planning and Control activity. You can login to Activity Manager here: <https://wpc-am.lbl.gov/>

### When does an activity need to be renewed?

Activity Risk Level	Renewal Period
1 – Low Hazard	Every 3 years
2 – Moderate Hazard	Every 2 years
3 – High Hazard	Every year

### Overview of process:

30 days before an activity reaches its renewal date, the activity manager system starts the renewal process. Two things occur (1) Activity Manager creates a draft version of the activity that needs to be renewed. This gets the process started. (2) Activity Manager sends the Activity Lead an email (example below). This identifies the activity that needs to be renewed, and provides a link to the “DEVELOPING” version of the activity (which is the draft version you will review and edit as needed as part of the renewal process).



EH-0122 - LOTO Practical Training needs to be renewed by 09-07-2017. A draft version has been created by the system and is under development. The active version will exceed the renewal date in 30 days.

If the activity is not renewed by the due date, both the active and draft versions of the activity will be closed automatically after 395 days.

Use this link to access the draft version

[Click Here](#)

*You are receiving this email from LBNL's Activity Manager work authorization system.*

*To learn more about Activity Manager or the Work Planning & Control (WPC) program visit <http://wpc.lbl.gov> or contact your Division Safety Coordinator.*

### Renew an activity or edit an activity?

There are times when an Activity Lead may choose to renew an activity before the renewal date. For example, if an Activity Lead is already planning to edit an activity, for example because the scope of work has changed, or the hazards have changed (**and**) it is getting near the time to renew the activity (two or three months before the renewal date, as an example), it is better to renew the activity rather than using the “edit activity” function. Why? if you chose “edit activity” and put a lot of work into editing the activity, you would still need to renew the activity a few months later when the renewal date comes up (doubling your work). In this way, choosing Renew Activity saves you time and effort. (Page 4 shows how to renew an activity by choice).

## Renewing (Risk-level 1) and (Risk-level 2) Activities:

As mentioned above, 30 days before the renewal date, activity manager creates a “DEVELOPING” copy of the “original” activity (as shown below). You can think of it as a copy, and it is the version you will review and edit. The reason the “ACTIVE” activity stays in place is so that workers remain authorized while you go through the renewal process.

The original activity remains active

The renewal activity is in Development

Activity ID	Status	Activity Name	Lead
EH-0066	ACTIVE	General Office Work	Salazar,Jack J
EH-0067	ACTIVE	Site Visits; Entering Technical Ar...	Salazar,Jack J
EH-0096	ACTIVE	EWRP Department Office-Based...	Kestell,David J
EH-0096	DEVELOPING	EWRP Department Office-Based...	Kestell,David J

When the Activity Lead finishes reviewing and making all changes, they select “**Choose an Action**” and “**Release for Approval.**” This notifies the Project Lead to review and approve the activity. After the Project Lead approves the activity, the renewed activity becomes the “ACTIVE” activity. The original, or previous activity is removed and archived.

This is the developing version of the currently active activity

EH-0096 - EWRP DEPARTMENT OFFICE-BASED ACTIVITIES  
ACTIVITY STATUS: DEVELOPING  
RENEWAL DATE: MARCH 05, 2018

1 Description 2 Define Work 3 Select Hazards 4 Review Hazards & Controls 5 Training Courses

Activity Name: EWRP Department Office-Based Activities

Parent Project: EWRP Department General Activities

Location: Building Room

4 Select "Release for Approval"

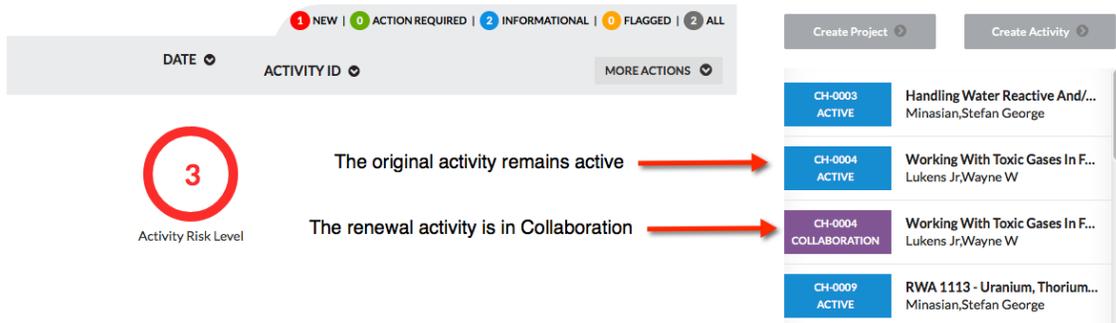
Choose An Action

- Release for Approval
- Copy Activity
- Printable Version
- Delete this version
- Manage OJT

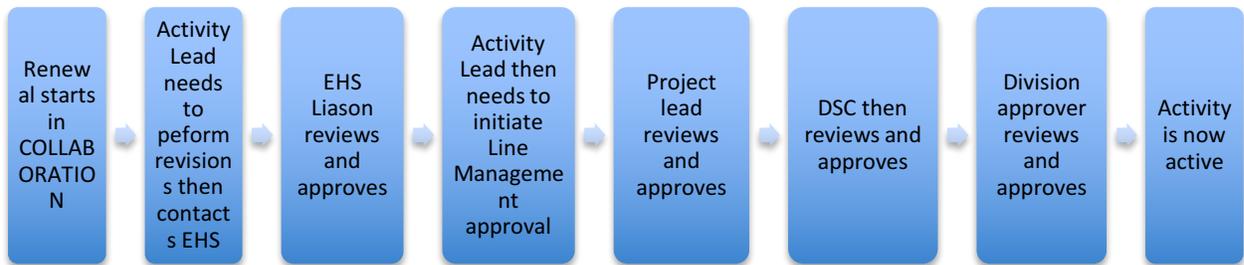
**Renewing (Risk-level 3) Activities:**

For risk-level 3 activities, the process is similar, but instead of starting with a DEVELOPING version the system creates a “COLLABORATION” version instead (as shown below). This is because risk-level 3 activities require collaboration (review and approval) from the EHS Liaison, Division Safety Coordinator, Project Lead and Division Approver. Each of these collaborators are notified when it is their time to review and approve the activity (outline of process shown below).

NOTE: The Activity Lead must contact EHS after they make their edits and updates. Why? EHS is waiting for you to finish before they get involved.



The following outlines the preview and approval process. When done, the activity becomes “ACTIVE.” The original, or previous activity is removed and archived.



## Renewing an activity before the renewal date

**Step 1:** From the home page, open the activity you want to renew.

The screenshot shows the 'ACTIVITY MANAGER - QA' dashboard. The top navigation bar includes links for HOME, MY WORK SUMMARY, HAZARDS & CONTROLS, PROJECTS, WORKERS, SEARCH, SETTINGS, RESOURCES, DASHBOARDS, and SUPPORT. The main content area is divided into 'MY WORK' and 'MY ACTIVITIES'. The 'MY WORK' section has filters for 9 NEW, 0 ACTION REQUIRED, 15 INFORMATIONAL, 0 FLAGGED, and 15 ALL. Below the filters is a table of activities:

DATE	ACTIVITY ID	MORE ACTIONS
Aug 14, 2017	EH-0149	1 Open the activity you want to renew assigned as a PL <a href="#">Read full description</a>
Aug 14, 2017	EH-0145	Sunkara, Anusha has been assigned as a PL <a href="#">Read full description</a>
Aug 14, 2017	EH-0134	Sunkara, Anusha has been assigned as a PL <a href="#">Read full description</a>

The 'MY ACTIVITIES' section on the right lists several active activities, including EH-0066, EH-0067, EH-0096, EH-0097, and EH-0149.

**Step 2:** Select "Renew Activity"

The screenshot shows the 'ACTIVITY SUMMARY' page for activity EH-0096. The page includes a header with 'ACTIVITY MANAGER - QA' and navigation links. The main content area displays the activity details:

**ACTIVITY SUMMARY**  
EH-0096 - EWRP DEPARTMENT OFFICE-BASED ACTIVITIES  
ACTIVITY STATUS: ACTIVE

Activity Risk Level: 1

Activity Lead: David Kestell  
Activity Name: EWRP Department Office-Based Activities  
Activity Approved Date: March 04, 2016  
Activity Renewal Date: March 05, 2018  
Activity Division: Environ, Health, & Safety  
Project Lead: Sunkara, Anusha

The 'Renew Activity' button is highlighted with a red box and a callout box that says "Select 'Renew Activity'".

**Step 3: Review the activity** and make any changes needed so that the activity accurately represents the work performed. You can navigate to the area you want to change using the tabs “Define Work”, “Select Hazards” etc.

**Step 4: When done, select “Choose an Action” and “Release for Approval”** for Risk-level 1 and 2 activities.

**If it is a risk-level 3 activity, select “Choose an Action” and “Initiate EHS Review.”** This notifies the EHS Liaison, Division Safety Coordinator to review and approve the activity.

After the activity has gone through the review and approval process, it becomes active. The “original” activity is deactivated and archived.